

How to merge a unit into another unit.

A PHA might want to merge two smaller units into one larger unit to better its market demand. For example, two 0-bedroom units might be merged into one 1-bedroom unit. There are two parts to the task.

1. Increasing the number of bedrooms for the unit that will continue to exist.
2. Marking the unit that is ceasing to exist as a “Merged unit”.

Increasing the number of bedrooms requires the HUD or HA user to navigate to the unit detail screen for the unit that will continue, changing the number of bedrooms, then clicking “Save”.

To mark the other unit as a merged unit, a HUD user will use the following steps.

1. Navigate to the unit detail screen for the unit being merged into another unit.

The screenshot shows a web application titled "Unit Details" in a Microsoft Internet Explorer browser. The application has a navigation bar with tabs for "Development", "Unit", "Approval", "Reports", "Building/Unit Data Transfer", and "Upload Error Report". The "Unit" tab is selected. The main content area is divided into two sections: "Unit Information" and "Head of Family Details".

Unit Information

Unit Number:	2E	Building:	H0001
Entrance Number:	1	Building Entrance Address:	620 SW E AVENUE
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Floor Number:	1
Door Number:	2E	Unit Designation:	Elderly Unit
Bedroom Count:	1	Unit Status:	<input type="radio"/> Exception <input type="radio"/> Not Reported <input checked="" type="radio"/> Occupied by Assisted Tenant <input type="radio"/> Vacant Or Otherwise Occupied
Submission Status Type:	Initial Approval Completed	Reason for Exception:	Vacant & undergoing modernization
		Effective Date:	06/05/2006

Head of Family Details

As the MTCS data transfer routine has been/is being executed, all further updates to the Head of family details must be done using the MTCS sub-module.

Social Security Number:	-
First Name:	-
Last Name:	-
Occupancy Date:	-

A "Save" button is located at the bottom right of the form.

2. Click the “Exception” button.

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3. A comment dialogue box appears. Enter a comment explaining what the exception is and/or its justification.

- Click “Save” to save your comment. The screen will change like the next screen shot.

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- Now the “Reason for exception” pull down list is enabled. Click the triangle on the right end of the pull down to see the choices.

The screenshot shows a web browser window titled "Unit Details - Microsoft Internet Explorer provided by HUD". The address bar shows "http://localhost:8080/units/unitdetails.asp". The page has a navigation bar with links like "LOGOFF", "HUD HOME", "PIC HOME", "Q & A", "SEARCH/INDEX", "E-MAIL", and "MASS MAIL". Below the navigation bar, there are tabs for "Development", "Unit", "Approval", "Reports", and "Assignment". The "Unit" tab is selected, and the "Unit List" sub-tab is active. The main content area displays "Unit Information" for a specific unit. The unit number is "ZE", and the building is "88001". The address is "626 SW E AVENUE". The floor number is "1". The unit designation is "Elderly Unit". The submission status type is "Initial Approval Completed". The unit status is "Occupied by Assisted Tenant". The reason for exception is "Merged Unit". The effective date is "MM/DD/YYYY". Below the unit information, there is a section for "Head of Family Details" with fields for Social Security Number, First Name, Last Name, and Occupancy Date. A "Save" button is located at the bottom right of the form.

Unit Information	
Unit Number:	ZE
Building:	88001
Entrance Number:	1
Building Entrance Address:	626 SW E AVENUE
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Door Number:	ZE
Floor Number:	1
Bedroom Count:	1
Unit Designation:	Elderly Unit
Submission Status Type:	Initial Approval Completed
Unit Status:	Occupied by Assisted Tenant
Reason for Exception:	Merged Unit
Effective Date:	MM/DD/YYYY

Head of Family Details

As the MTCS data transfer routine has been being executed, all further updates to the Head of family details must be done using the MTCS sub-module.

Social Security Number:	-
First Name:	-
Last Name:	-
Occupancy Date:	-

Save

- Choose “Merged unit”. DO NOT choose “Conversion unit” (this choice is being removed soon). Enter an Effective Date for the unit merger.

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- Now the “Unit Designation” pull-down list is enabled. Click the triangle and scroll down to highlight “Not applicable” (for the merged unit).

The screenshot shows a web browser window titled "Unit Details" with a Microsoft Internet Explorer address bar. The page has a navigation bar with links like "LOGOFF", "HUD HOME", "FCH HOME", "Q & A", "SEARCH/INDEX", "E-MAIL", and "MASS MAIL". Below this is a "pic" logo and a "Development" sidebar with links: "PIC Home", "MASS Mail", "PIC Mail", "Logoff", "Help", "Guided Tour", "Housing Authority", and "Development". The main content area is titled "Unit Information" and contains the following fields:

Unit Number:	2E	Building:	88991
Entrance Number:	1	Building Entrance:	
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Address:	626 SW E AVENUE
Door Number:	2E	Floor Number:	1
Bedroom Count:	1	Unit Designation:	<div>Unit Designation dropdown menu is open, showing options: Elderly Unit, Elderly and Disabled, Elderly Unit, Family and Disabled, Family Unit, Not Applicable (highlighted), Official Designation - Disabled, Official Designation - Elderly, Official Designation - Mixed.</div>
Submission Status Type:	Initial Approval Completed		
Unit Status:	<div>Unit Status dropdown menu is open, showing options: Not Applicable, Official Designation - Disabled, Official Designation - Elderly, Official Designation - Mixed.</div>		
Reason for Exception:			
Effective Date:	+MM/DD/YYYY		

Below the Unit Information section is a "Head of Family Details" section with a red warning message: "As the MTCS data transfer routine has been being executed, all further updates to the Head of family details must be done using the MTCS sub-module." It includes fields for Social Security Number, First Name, Last Name, and Occupancy Date, each with a red asterisk indicating a required field. A "Save" button is located at the bottom right of the form.

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- Another comment dialogue box will open. Say when it is not applicable (“Merged unit” is good reason>.) Click “Save”.

The screenshot shows a web application interface for unit management. A dialog box titled "Unit Comments" is open, displaying a "Default Comment" and a "Reason for Change" dropdown set to "Change in Use". The "Enter Comments" text area contains the text "Merged unit". The background form, titled "Unit Details", includes fields for Unit Number (2E), Entrance Number (1), ACC Unit Indicator (Yes), Door Number (2E), Bedroom Count (1), Building (88991), Building Entrance Address (620 SW E AVENUE), Floor Number (1), Unit Designation (Not Applicable), Unit Status (Occupied by Assisted Tenant), Reason for Exception (Merged Unit), and Effective Date (11/02/2006). A "Head of Family Details" section is also visible at the bottom.

Unit Comments Dialog Box:

- Default Comment: User MW1256 has changed the Unit Type from IL to HA
- Reason for Change: Change in Use
- Enter Comments (Click black, the default comment will be stored): Merged unit
- Buttons: Save, Cancel

Unit Details Form:

Unit Number:	2E	Building:	88991
Entrance Number:	1	Building Entrance Address:	620 SW E AVENUE
ACC Unit Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Floor Number:	1
Door Number:	2E	Unit Designation:	Not Applicable
Bedroom Count:	1	Unit Status:	<input checked="" type="radio"/> Occupied by Assisted Tenant
Submission Status Type:	Initial Approval Completed	Reason for Exception:	Merged Unit
		Effective Date:	11/02/2006

Head of Family Details:

As the MTC's data transfer routine has been being executed, all further updates to the Head of family details must be done using the MTC's sub-module.

Social Security Number:	-
First Name:	-
Last Name:	-
Occupancy Date:	-

Buttons: Save

- Click the “Save” button on the lower right corner of the screen.

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10. When you are finished, the screen will look like this. Note the following fields are different:

- Unit designation (not applicable).
- Unit status (exception).
- Reason for Exception (Merged unit).
- Effective Date (of the unit merger)

The screenshot shows the 'Unit Details' page in the PIC web application. The page is divided into several sections:

- Navigation Bar:** Includes links for LOGOFF, BUILDING, SUBMISSION, FOR UNIT INFORMATION, MAINTAIN INVENTORY, CAPFUND (BIA) CERTIFICATION, and SEARCH/INDEX. There are also links for E-MAIL and BASS MARK.
- Left Sidebar:** Contains links for PIC Home, HQ Division, HQ Office, Hub, Field Office, Field Office HA, Physical Development, and a 'Guided Tour' section.
- Main Content Area:**
 - Unit Information:** Displays Unit Number 2E, Building 88001, and Entrance Number 1. It also shows the ACC Unit Indicator (Yes/No), Door Number 2E, and Bedroom Count 1.
 - Submission Status:** Shows 'Initial Approval Completed'.
 - Unit Designation:** Set to 'Not Applicable'.
 - Unit Status:** Set to 'Exception'.
 - Reason for Exception:** Set to 'Merged Unit'.
 - Effective Date:** Set to 11/22/2006.

11. For the changes to fully take effect (for CapFund and historical purposes), the HA must then submit and the Field Office must approve the changes.